

The Digital Beauty Consumer

July 2020

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INTRODUCTION

Scope

Key findings

Sharp downturn in global beauty and personal care in 2020

Digitalisation to accelerate driven by channel shifts, home seclusion

BEAUTY IN DIGITAL AGE

Tech-driven, digitally-enabled beauty a key disruptor pre-COVID-19

Every step in digital path to purchase can lead to instant decision

COVID-19 digitalised all beauty consumers to varying extent

Retail closures, in-store limits to increase influence of digital

Beauty and personal care industry braces for digital ramp-up

LATAM digitalisation in messaging apps, e-commerce supplement

Livestreaming strengthens no-contact consumer interaction

MEET THE DIGITAL BEAUTY CONSUMER

Meet the “digital beauty consumer”

Digital beauty consumers are more likely to be female, aged 45+

Digital beauty consumers: best in class versus most growth potential

Digital beauty consumers: by market

Rely on user reviews more over brand-provided info

Rely on apps for product information, guidance on selection

Extensive beauty routines are expected to simplify, streamline

Quality and price to be redefined among digital beauty consumers

Willingness to experiment poses opportunities for AR, subscriptions

Digital will overlap with key COVID-19 themes in beauty

LEVERAGING DIGITAL TO MEET EXPECTATIONS: HEALTHY BEAUTY

Pre-pandemic, blurring of health and beauty driven by holistic goals

Potential for beauty tech innovation in collaboration with science

Mental and wellbeing underscore holistic view of healthy beauty

LEVERAGING DIGITAL TO MEET EXPECTATIONS: PERSONALISED BEAUTY

Personalisation for the digital beauty consumer

Personalisation a lower priority during, immediately after pandemic

Digital engagement acts as a guide in the selection process

Digital can supplement no-contact personalisation experiences

LEVERAGING DIGITAL TO MEET EXPECTATIONS: CONSCIOUS BEAUTY

Clean beauty the new default amid transition to conscious beauty

Ethical, sustainable demands and practices to be impacted

Conscious beauty extends to brand purpose and ethical impact

CONCLUSION

Impact of COVID-19 on digitalisation of beauty

What should business focus on?

Key findings

RESEARCH OVERVIEW

Overview of Beauty Survey

Four years of tracked data covering 40 products and 700+ brands

Overview of Health and Nutrition Survey

Overview of Digital Consumer Survey

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